Israel: Dominance of Fixed Communications to Continue Driven by New Regulatory Reforms of the Government

Description:

Summary

Telecoms growth is lower than average when compared to other countries in the region, but the overall size of the telecoms market is significant in view of Israel's relatively small population. Unlike other telecom markets in the region, telecom service revenue growth will mainly be driven by fixed line services following recently introduced reforms for network sharing and wholesale services.

Key Findings

- Telecom service revenue in Israel is estimated to reach $4.7bn (or 1.6% of GDP) in 2015, registering a decline of 9.5% over the previous year. Mobile data will continue to be the highest growth market, contributing to 25.6% of overall telecom revenue in 2015. Mobile voice revenues are declining due to intensified competition and a saturated voice market.

- The author expects to see total telecom service revenue grow at a CAGR of 1.8% during 2015-2020 to reach $5.1bn.

- The top two operators, Bezeq (including Pelephone) and HOT (including HOT Mobile), will account for 57.5% of overall service revenue in 2015. The Israeli telecom market will remain highly competitive due to network sharing deals and the introduction of wholesale services.

- Adoption of 3G technologies will reach 71.5% of the mobile subscription base in 2015 and will decline due to operators shifting their focus to LTE network expansion and service roll out.

- Over the next five years, operators should seize opportunities related to LTE service roll outs, network expansions, and IPTV and VoD services. Vendors should position themselves to support operators' network upgrades and expansion plans.

Synopsis

“Israel: Dominance of Fixed Communications to Continue Driven by New Regulatory Reforms of the Government” provides an executive-level overview of the telecommunications market in the Israel today, with detailed forecasts of key indicators up to 2020. It delivers deep quantitative and qualitative insight into the Israeli telecom market, analyzing key trends, evaluating near-term opportunities and assessing risk factors, based on proprietary data from the databases.

It provides in-depth analysis of the following:

- Israel in a regional context; a comparative review of market size and trends with that of other countries in the region.

- Economic, demographic and political context in Israel.

- The regulatory environment and trends; a review of the regulatory setting and agenda for the next 18-24 months as well as relevant developments pertaining to spectrum licensing, national broadband plans, network sharing and more.

- A demand profile; analysis as well as forecasts and historical figures of service revenue from fixed telephony, broadband, mobile voice and data markets.

- The service evolution; a look at the change in the breakdown of overall revenue by fixed and mobile sectors and by voice, data and video in the current year as well as the end of the forecast period.

- The competitive landscape; an examination of key trends in competition and service providers' performance, revenue market shares and expected moves over the next 18-24 months.

- An in-depth sector analysis of fixed telephony and broadband services, mobile voice and data services; a quantitative analysis of service adoption trends by technology/platform as well as operator, average revenue.
per line/subscription and service revenue through the end of the forecast period

- Main opportunities; this section details the near-term opportunities for operators, vendors and investors in the telecommunications market in Israel

Reasons To Buy
- Gain in-depth analysis of current strategies and future trends of telecommunications market of Israel, service providers and key opportunities in a concise format, to build proactive and profitable growth strategies.

- Understand the factors behind ongoing and upcoming trends in Israel’s mobile communications, fixed telephony and broadband markets, including the evolution of service provider market shares, to align product offerings and strategies to meet customer’s demand.

- Leverage the graphical information (more than 20 charts and tables in the report based on the forecast products), to gain an overview of the Israel’s telecom market.

- Contains analysis of key telecom players in the market and major business strategies being adopted by them, to identify the opportunities to improve the market share.

- Explore novel opportunities to align your product strategies and offerings to meet the requirements and succeed in the challenging telecommunications market in Israel.

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